



QuickBooks Online Conversion Instructions

As Envision Bank completes its system conversion to Abington Bank, you will need to modify your QuickBooks Online settings to ensure that your data connectivity transfers smoothly to the new system.

To navigate this document, just click the link below that matches your product connectivity:

Instructions for Downloading a Web Connect file from your Online Banking Site

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On Friday, November 4th, 2022:

1. Complete a final transaction download.
2. Complete last transaction update before the change to get all of your transaction history up to date.
3. Accept all new transactions into the appropriate registers.

On Monday, November 7th, 2022:

1. Disconnect online banking connection for accounts connected to Envision Bank.
 - a. Select **Banking** from the left column.
 - b. Click on the account you would like to disconnect, then click the **Pencil** icon on the corner of that account box.
 - c. Click **Edit Account Info**.
 - d. Check the box next to **Disconnect this Account on Save**.
 - e. Click **Save and Close**.
 - f. Repeat steps for any additional accounts that apply.
2. Reconnect online banking connection for accounts at Abington Bank.
 - a. Download a Web Connect file (.qbo or .qfx) from your Abington Bank online banking.
 - b. In QuickBooks Online, choose **Banking** from the left column.
 - c. Click **File Upload** in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
 - d. Choose the appropriate account from the drop-down menu under **QuickBooks Account** and then click **Next**.

Important: Do NOT choose "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
 - e. When the import is finished, click **Let's go!**
 - f. Review the For Review tab on the Banking page to view what was downloaded.
 - g. Click **Next**, and then click **Done**.
 - h. Repeat this step for each account that you have connected to this institution.